

Executive Transitions

User's Guide Introduction (excerpts)

The hiring of an executive director is a major strategic event in the life of a museum. Whether the need for a new director is brought about by a board decision or by a director's decision to resign or retire, whether it is received with a sigh of relief or feelings of loss, it presents a tremendous opportunity for institutional growth. The dismissal of an ineffective leader, the retirement of a longstanding and much-loved director, a move dictated by a personal situation, or an offer that was simply too good to pass up—each situation brings different challenges for the board, staff, and volunteers that can stimulate renewed focus, energy, and commitment.

Although the goal of an executive search is to find new staff leadership, the process has the potential to strengthen board leadership as well. As one board president put it, "The way we work together was radically transformed by that three-hour meeting when the Search Committee had to decide between our two top candidates." An executive search can produce many ancillary dividends: clarity about the museum's priorities, opportunities to identify new board leaders, an invigorated and empowered staff, and a broader base of community support. This publication will help you make the most of this significant moment of change in the life of your institution.

Between 1996 and 1999, 45 percent of the 800 museums accredited by the American Association of Museums experienced turnover in the director's office. This means that each year, an estimated 15 percent of museums nationwide are involved in a director search. Between 1998 and 2000, nearly 500 positions for directors were advertised in *Aviso*, the American Association of Museums' monthly newsletter, and countless others were listed in local, state, and regional publications. The average tenure of a museum director is just 4.5 years.

These statistics suggest that executive transition is a regularly occurring event. Viewing it in that way can reduce some of the pressures felt by the Search Committee and the entire museum family. The executive search process is intense, but it need not be exhausting. The considerations are complex, but they need not be confusing.

Boards must resist the pressure to fill the vacant executive position immediately, because imposing a tight deadline increases the likelihood of skipping important steps, overlooking critical issues, and making an unsound decision. The executive director of a nonprofit support center advises, “Boards must realize the importance of their hiring decision and make sure they have enough time to do it right.” Using this publication, the board can focus its time and energy on filling the leadership void for the short term and selecting the best new executive for the long term.

Many museum boards feel overwhelmed and under-resourced in their search for a new executive. This reaction is not surprising because, unlike their corporate counterparts, museum trustees must add the search to countless other volunteer responsibilities. The public nature of museums leads stakeholders to feel that they are entitled to be a part of the process. Incorporating external perspectives is a valuable but time-consuming task for volunteers who are already stretched for time.

Unless they hire a search firm, boards have very little help in this critical task. Other aspects of board leadership have generated large bodies of literature, but little has been written about the executive search. While this publication discusses the costs and benefits of hiring a search firm, it is designed for the board that is conducting its own search.

Users will range from small museums with just a few paid staff members who must pick up the responsibilities of the director to large museums with many staff members and transition budgets that allow them to hire interim leadership. Whatever the size of your institution, we hope that you will not rule out suggestions because they seem beyond your reach. You may be able to implement them using pro bono help or volunteers from organizations such as Business Volunteers for the Arts, which has offices in many communities (see the Resources section). . . .

In his book *Managing Transitions: Making the Most of Change*, William Bridges identifies three stages in the transition process. He refers to the first as the “ending,” emphasizing that all transitions actually begin when something ends—in this case, the tenure of the previous director.⁵ He calls the second stage the “neutral zone” because the outcome of

the transition is not yet clear. Staff members, trustees, and other stakeholders don't know who will lead them into the future. Moving through this intermediate stage requires patience, persistence, and confidence in the process. Bridges calls the third stage "new beginnings," acknowledging that what seems like the end of the process is really the beginning of a new future for the organization. Since the executive transition in a museum is a chronological, linear process, it is helpful to organize it in three stages: groundwork, search, and transition.

The **groundwork** stage is the foundation for the rest of the search process. In a hurry to find a new leader, many institutions are tempted to skip this stage and jump right into the search. But building without a firm foundation can have disastrous consequences. To lay the groundwork, the board first allocates the human and financial resources for the search. The board chair and the Executive Committee then identify and recruit Search Committee members, writing a commitment letter that clarifies the expectations for those charged with the important task of finding the museum's new leader. One of the Search Committee's first jobs is to identify the museum's current strengths and weaknesses and hold a retreat to envision the new director's greatest opportunities and challenges.

Although the **search** stage involves most of the steps that boards identify with an executive search, it is important to underscore that this is the *second* stage in the process, not the first. After completing the groundwork stage, the Search Committee identifies and prioritizes the professional skills and personal qualities needed in the new director. Then it is ready to outline the duties and expectations for the position in a written job description. The committee creates a position announcement, advertises in print and electronic media, evaluates the initial pool of applicants, conducts phone interviews, and selects and interviews the top candidates. Reference checks on the finalists follow, and then the committee extends an offer to its top candidate.

To maximize the investment of time and energy that has been devoted to hiring the new director, it is important to plan for a smooth **transition**. From the time the new director is hired to his or her first anniversary, the Search Committee and the board will work together to plan the most effective orientation and introductions. They will schedule meetings, retreats, and assessments throughout the first year using the transition

calendar and consulting the books, periodicals, websites, and organizations listed in the Resources section. . . .

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